



DEPARTMENT OF ADMINISTRATIVE SERVICES

Milwaukee County

FILL OUT AND RETURN ORIGINAL AND ONE COPY OF THE CONTRACTOR QUALIFICATION STATEMENT.

RETURN ORIGINAL PLUS ONE COPY OF THE COMPLETED FORMS TO:

OFFICE OF THE COUNTY CLERK
Room 105 - COURTHOUSE
901 North 9th Street
Milwaukee, WI 53233

THIS QUALIFICATION STATEMENT WILL BE VALID FOR A PERIOD OF THREE YEARS COMMENCING ON THE DATE OF FILING OF THE COMPLETED FORMS IN THE OFFICE OF THE COUNTY CLERK.

NOTE: SECTION 43.02 (4) OF CHAPTER 43 OF THE GENERAL ORDINANCES OF MILWAUKEE COUNTY:

"The contents of the qualification statements shall be confidential and shall not be disclosed except by the written authorization of the contractor furnishing the same, or for use by the county in qualifying the contractor, or in case of action against or by the contractor or county."

QUALIFICATION METHODS AND PROCEDURES*

- (1) Bidders who want to be approved for award of contract on public works projects shall submit to the county clerk two (2) copies of a completed contractor qualification statement of financial ability, equipment, experience in the work prescribed in the contract for the protection and welfare of the public in performance of any public contract. Statement shall be in the form required by section 43.04 of the Code. The completed qualification statement shall be received by the county clerk not less than five (5) calendar days prior to the bid due date. Contractor qualification statement is valid for a three-year period commencing on the date filed with the county clerk and will terminate in three (3) years after the last date of the month the qualification statement was filed with the county clerk.
- (2) Contractor qualification shall be required for each bid. Contractors who have submitted a qualification statement within three (3) years preceding the bid due date shall acknowledge a statement included in the bid form verifying that the information in the qualification statement has not changed.
- (3) The county clerk shall provide a copy of all contractor qualification statements to the director of public works. The statements shall be retained by the county clerk for a three-year period commencing on the date they are filed with the county clerk.
- (4) The contents of the qualification statements shall be confidential and shall not be disclosed except by the written authorization of the contractor furnishing the same, or for use by the county in qualifying the contractor, or in case of action against or by the contractor or county.

METHOD OF QUALIFYING BIDDERS

- (1) The director of public works shall review the information provided in the bid and the contractor qualification statement to determine if the low bidder is responsive and responsible to perform the work. At the request of the director, the bidder shall provide additional information verifying their responsibility and responsiveness. If the director rejects a low bid based on lack of responsibility and/or responsiveness of the bidder, that bidder shall be notified of the right to appeal pursuant to chapter 110 of the Code.
- (2) The County will make certain its needs are met by awarding to a responsible bidder who has the lowest bid. The concept of lowest responsible bidder includes the definition of two terms - responsible and responsive. The term "responsible" refers to the bidder's integrity and reliability. Bidders who have the structure and ability to perform as promised and to stand behind what they deliver to the county are responsible bidders. The term "responsive" refers to the bidder's ability to meet the contract requirements.
- (3) The following outlines criteria for determining the lowest responsible and responsive bidder:
 - Financial ability to complete the contract.
 - Skill, judgment, experience and resources to capably complete the contract.
 - Necessary facilities, staff, personnel and equipment to complete the contract.
 - Demonstrated ability to satisfactorily perform the work in a prompt and conscientious manner.
 - Demonstrated ability to comply in situations where the award is contingent on special considerations subject to the nature of the contract.

From County Ordinance Chapter 43

(4) Contractors shall have personnel on staff that are trained in the trade and occupation required by the contract they are bidding. The intent of this statement is that contractors will use their own forces as much as possible per contract conditions.

(5) The county reserves the right to require additional qualifications for any specific project. When so required, the advertisement for bids and bidding documents will state this requirement.

(6) If any bidder who has been awarded a contract violates any agreement in such contract or delays the performance required by such contract or a bidder be adjudged bankrupt or insolvent, the name of such contractor and the circumstances of the contractor's default shall be reported promptly to the director of public works, who will take action to investigate and ascertain the situation and shall promptly notify said bidder of any intended action. The right to appeal shall enure to said bidder as defined in chapter 110 of the Code.

FORM OF QUALIFICATION STATEMENT

(1) A contractor qualification statement form and sworn statement shall be completed by contractors requesting approval as qualified contractors. If a contractor qualification statement has been filed within three (3) years of bid due date, and is still accurate, the bidder should acknowledge this through the statement included in the bid form.

(2) Only the firm named in the Contractor's Qualification Statement is eligible for award of contract.

*From County Ordinance Chapter 43

CONTRACTOR QUALIFICATION STATEMENT

Submit to the County Clerk of Milwaukee County

Contractors shall have the financial ability, skill, judgment, experience, resources, facilities, staff, personnel and equipment to complete the contract; and shall have the ability to perform and to comply with special considerations of the contract.

The contents of the qualification statement shall be confidential and shall not be disclosed except by the written authorization of the contractor furnishing the same, or for use by the county in qualifying the contractor, or in case of action against or by the contractor or county.

The undersigned certifies under oath that the information provided herein is true and sufficiently complete so as not to be misleading.

NAME: _____
Firm Name

ADDRESS: _____
Street

City State Zip

TELEPHONE NO. _____ FAX NO. _____

E-MAIL ADDRESS: _____

SUBMITTED BY: ___Corporation
 ___Partnership
 ___Individual
 ___Joint Venture
 ___Other

Type of work:
___ General Construction
___ Plumbing
___ Heating, ventilating & air conditioning
___ Mechanical (Plumbing, HVAC, Fire protection)
___ Electrical
___ Mechanical site and street utilities
___ Paving
___ Other _____
(please specify)

1. ORGANIZATION

- a. How many years has your organization been in business as a Contractor?

- b. How many years has your organization been in business under its present name?

1. Under what other or former names has your organization operated?

- c. If your organization is a corporation, answer the following:

1. Date of incorporation: _____

2. State of incorporation: _____

3. President's name: _____

4. Vice-president's name(s): _____

5. Secretary's name: _____

6. Treasurer's name: _____

- d. If your organization is a partnership, answer the following:

1. Date of organization: _____

2. Type of partnership (if applicable): _____

3. Name(s) of general partner(s): _____

- e. If your organization is individually owned, answer the following:

1. Date of organization: _____

2. Name of owner: _____

- f. If the form of your organization is a joint venture or other than those listed above, describe it and name principle(s):

2. LICENSING

- a. List jurisdictions and trade categories in which your organization is legally qualified to do business and indicate registration or license numbers, if applicable.

- b. List jurisdictions in which your organization's partnership or trade name is filed.

3. EXPERIENCE (If more space is needed, submit a separate sheet noting Article and paragraph, i.e. 3a., other categories of work, etc.)

- a. List the categories of work that your organization normally performs with its own forces.

- b. List the construction experience and present commitments of the key individuals of your organization.

- c. List the trade or occupation classification(s) of your employees.

- d. On a separate sheet, list major construction projects your organization has in progress, giving the name of project, owner, architect/engineer, contract amount, percent complete and scheduled completion date.

1. State total worth of work in progress and under contract.

2. Provide name and telephone number of Owner contact.

- e. On a separate sheet, list the major projects your organization has completed in the past five years, giving the name of project, owner, architect/engineer, contract amount, date of completion, and percent of the cost of the work performed with your own forces.

1. State average annual amount of construction work performed during the last five years.

2. Provide name and telephone number of Owner contact.

- f. Has the firm been asked to be relieved from a bid submitted to a public or private authority in the past 10 years? Yes____ No____

If yes, state:

Dates: _____ Owner: _____

Owner's mailing address:

Full particulars in each instance:

g. Has firm ever been relieved of a contract by a public or private awarding authority through court action or mutual agreement?

Yes _____ No _____

If yes, give particulars in each instance:

h. Has firm ever been convicted or disbarred because of a wage rate violation?

Yes _____ No _____

If yes, give: Date _____

Claimants: _____

Full particulars in each instance:

4. EQUIPMENT

List the major equipment owned, the availability, size, capacity, condition (poor, fair, good, new) and years of service.

Equipment	Availability	Size, Capacity	Condition	Years of Service

5. REFERENCES

a. Trade References:

b. Bank References:

c. Surety:

Name of bonding company:

Address:

Name and address of agent:

6. FINANCIAL

- a. Financial Statement: Attach a financial statement, preferably audited, including your organization's latest balance sheet and income statement showing the following:
1. Current Assets (e.g., cash, joint venture accounts, accounts receivable, notes receivable, accrued income, deposits, materials inventory and prepaid expenses);
 2. Net Fixed Assets;
 3. Other Assets;
 4. Current Liabilities (e.g., accounts payable, notes payable, accrued expenses, provision for income taxes, advances, accrued salaries and accrued payroll taxes);
 5. Other Liabilities (e.g., capital, capital stock, authorized and outstanding shares' par values, earned surplus and retained earnings).
- b. Name and address of firm preparing attached financial statement, and date thereof.
- c. Is the attached financial statement for the identical organization named on page one?

- d. If not, explain the relationship and financial responsibility of the organization whose financial statement is provided (e.g., parent-subsidiary).
- e. Will the organization whose financial statement is attached act as guarantor of the contract for construction?

7. SIGNATURE

Dated this _____ day of _____ 20__.

Date Month

Name of Organization: _____

By: _____
Signature

Title: _____

Name of Signator Above: _____

duly sworn deposes and says that the information provided herein is true and sufficiently complete so as not to be misleading.

Subscribed and sworn before me this _____ day of _____ 20__.

Date Month

Notary Public: _____

My Commission Expires: _____